

Please see the steps below for Creating an Ad Hoc Report for Award/IDV Information from the SAM.gov Databank

1. Log in to SAM.gov
2. Navigate to Databank
3. Select 'Contract Data' and 'Report Type' = 'Ad Hoc'
4. Select 'Award/IDV Information Report' which should take you to a default landing page 'My Reports'. will navigate to the Ad Hoc project related to Award/IDV data to let user create a report.
5. Select 'Create' then 'New Report' then 'Report Builder'
6. Once the Report Builder opens - please choose the related options. Steps 1 through 4 lets the user enter a range of dates for either Date Signed or Last Modified date. For this request,
  - a. Step 1: Enter 01/01/2017 as the Start Date for Date Signed
  - b. Step 2: requested date as the End Date for Date Signed
  - c. Step 5: User can browse through the categories and select desired attributes. Based on the FOIA, we recommend choosing 'Contracting Agency Name', 'Legal Business Name', Unique Entity ID', Description of Requirement' and 'Fair Opportunity/Limited Sources'.
    - i. User may search any other desired attribute from the list browsing through the folders or even by searching for the name of the field, if known, provided in the search box.
  - d. Step 6: Add the metrics such as different dollar amount metrics that are available and number of actions or total contract value.
  - e. After adding all the attributes and metrics that constitute the report structure, user can add additional filtering criteria by either browsing through the attribute elements or selecting them in the right side panel as shown in the screenshot.
  - f. As an example, 'Description of Requirement' with the filtering criteria Contains the string- 'limited sources justification'.
  - g. Save the Report with an appropriate name and run newly saved report when prompted.
  - h. User will be prompted with their selections, if needed any changes such as give a different Date range, user can make these changes in this screen and proceed with running the report to display desired results.

Note: Once the report is saved, you can re-execute the report to change the filtering criteria such as 'Description of Requirement' with the filtering criteria Contains the string- 'limited sources justification' to Vendor name contains 'Microsoft' for the desired result set per the business needs.